

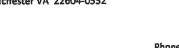
Frederick County, Virginia

COMMISSIONER OF THE REVENUE

www.fcva.us/cor

www.fcva.us/re

107 North Kent Street Winchester VA 22601 P.O. Box 552 Winchester VA 22604-0552





Phone: 540-665-5680 Fax: 540-667-6487

December 30, 2024

Application for:

Year 2025 Real Estate Tax Relief for Senior Citizens or

Permanently and Totally Disabled Persons

Requirements:

Any applicant must meet the first 6 to qualify

• First-Time Filer, if totally disabled, must meet all 7 to qualify

1. Either

(a) At least one spouse must be 65 years old or older

OR

(b) At least one spouse must be permanently and totally disabled

- Total income including tax exempt income of ALL residents of the dwelling cannot exceed \$56,000. An
 exclusion of the first \$8,500 of income is allowed for each relative other than either spouse that is living
 in the dwelling.
- 3. Combined net financial worth of all residents in the dwelling cannot exceed \$150,000, not including the principal residence and up to one acre.
- 4. If not a first-time filer, a change in income could mean a change in the amount of tax relief you receive for that year in the program.
- 5. Applications must be filed between January 2 and April 1 of each year that you are in the program.
- 6. Please bring income and asset verification including the first page of your 2024 federal return, if one was filed. No applications will be processed without copies of the required documentation.
- 7. First-Time filers who are permanently/totally disabled: Please attach to your application a certification letter from two doctors or a copy of the Social Security Administration letter. First time filer applications must be mailed with the applicant's signature. Unsigned applications will be declined.
- 8. If you do not receive 100% tax relief, you may inquire about the Real Estate Tax Deferral Program. Use the following link for more information: www.fcva.us/td

**NOTE: NO APPLICATIONS WILL BE ACCEPTED AFTER THE APRIL 1ST DEADLINE.

Sincerely,

Tonya C. Sibert
Commissioner of the Revenue



FREDERICK COUNTY, VIRGINIA Office of the Commissioner of the Revenue

P. O. Box 552 Winchester, Virginia 22604-0552 Phone: (540) 665-5680

FILING DEADLINE: APRIL 1, 2025

Record Number:

FILE EARLY TO AVOID A DELAY IN PROCESSING APPLICATION FOR REAL ESTATE TAX EXEMPTION FOR ELDERLY AND DISABLED HOMEOWNERS

Date of Application	te of Application Application Number						
Applicant (Property Owner)	Last Name		#Inch				
8 of clumps	Last Nattie		First			Middle	
Addressstreet			City		State	Zip	
Birth Date Social Sect		rity Number Phone_					
Spouse							
Last Name			First			Middle	
AddressStreet			City		State	Zip	
Dinth Data		rity NumberPhone_					
Month Day	Year Social Securit	y Number		Priorie_			
Name 1. Please complete this gross incon of all residents living in the dwe	ne statement for the calenda	r vear 2024. Include	ed in the statement sication.	should be the to	tal gross income	e from all sources	
GROSS INCOME	Documentation Required	Applica	nt	Spouse		ves\Others in dwelling	
Salaries, Wages, Etc.	W-2, 1099						
Pensions	1099-R						
Social Security (Check Amt.)	1099-SSA						
Interest/Dividends	1099-INT/OID 1099-DIV						
IRA Distributions	1099-R						
Rent(s)	Schedule E						
Welfare	Cola Notice						
Gifts	Specify						
Capital Gains	Schedule D						
Trust Fund Income	Schedule E						
Other Sources	Specify						
TOTAL							
Total Gross Combined Income of NOTE: If you filed a Federal Income. 2. Is this dwelling occupied by the state of the State of State of the State of State o	ome Tax Return <u>for 2024</u> the applicant as the sole o Partial Owner	attach a copy. dwelling? Yes [□ No □				
4. List the names, relationship, Please indicate their annual i		numbers of all pe	rsons residing wit	h the applicant	t, <u>except for t</u>	he spouse.	
NAM	E	Income Y/N	RELATIONSHIP	AGE	SOCIAL SE	CURITY NO.	
				UI I	I		

Please complete this statement of net financial worth as of December 31, 2024. Net financial worth is computed by substracting liabilities from assets and shall include all assets, including equitable interest, of the owner of the dwelling for which exemption is claimed, and shall exclude the fair market value of the dwelling and the land, not exceeding one acre, upon which the dwelling is situated. Documentation required for verification.

NET VALUE OF ASSETS Relatives/Others living 5. Documentation **SPOUSE** APPLICANT (Use Actual Amounts as of 12/31/2024) in dwelling REAL ESTATE / Exclude value of applicants residence and lot, not to exceed (1) acre. 1/1/2025 Assessment Automobiles: Yr. Make * SEE BELOW Make Model Yr. Make Mobile Homes: Yr. Make Model * SEE BELOW Bank Money in Certificates Statement Rank Checking Account(s) Statement Bank Savings Account(s) Account Stocks/Bonds Statement Property in Trust * SEE BELOW Account IRA(s) Statement Account Statement Life Insurance Policy · Cash Value As Of 12/31/2024 \$ \$ TOTAL - Assets As Of 12/31/2024 \$ Less - Total Liabilities ATTACH STATEMENT \$ * Copies of assessed values required if property is not in Frederick County **Total Combined Net Financial** Ś Worth of all Residents CERTIFICATE I certify, under the penalties provided by law, that this application for Real Estate Tax Relief for the Elderly, including any accompanying schedules or statements, to the best of my knowledge is true, correct and complete. Date Signature of Applicant Sworn (or affirmed) to before me this ___ DAY OF _____ 2025 _____ My commission expires _____ Signature of a notary public ___ -- OFFICE USE ONLY --Map Number _____ Record Number _____ Value of Bldg. ______ Total _____ Total _____ RE Tax __ Mobile Home _______ Value ______ VERIFIED MH Tax _____ INCOME ___ ASSETS _ Total Income _____ TAX RETURN FILED INITIALS ____ Total Assets _____ DATE _____ Amount of Exemption _____ _____ Mobile Home _____ Deferred Amount: Real Estate _____